BUY-IN • COUGH, COLD & ALLERGY

2012 season peaks late

By Michael Johnsen

As of the beginning of February, the cough-cold season had yet to materialize and illness levels were only just beginning to climb. If that's the case, then an expected illness peak in late February/early March would make the 2011-2012 cough, cold and flu season one of the later-peaking seasons in recent years.

As of Jan. 21, overall incidence of upper respiratory illness this season was down 7.5% according to IMS Health, as compared with the 2010-2011 season.

The 2011 fall allergy season leading into 2012 was relatively flat as compared with a strong 2010 fall season. And this spring allergy season is expected to recover from a slow 2011 season, Scott Hanslip, IMS Consumer Health director sales, told *Drug Store News*. "We're expecting a fairly strong spring [allergy season] in 2012. We're going to see more of a turn back to normalized conditions," he said.

Two cough-cold subcategories that may deserve a look for the coming season are asthma and hand sanitization. Both IMS Health and King Bio will be marketing their asthma-care offerings — Azma.com and AsthmaCare, respectively. And GoJo Industries will be revitalizing its line of hand sanitizers for next season with an Advanced Purell line.

Top 10 cold/allergy/sinus tablets/packets

BRAND	SALES*	% CHG
Private label	$923.5	16.1%
Zyrtec	202.9	-9.0
Claritin	164.2	-2.9
Allegra	154.8	NA
Mucinex DM	145.6	3.2
Mucinex	122.4	-10.5
Claritin-D	114.5	-8.5
Mucinex D	84.3	0.6
Theraflu	83.6	13.2
Benadryl	68.0	-40.9
TOTAL	$2,749.8	21.9%

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

Top 10 cold/allergy/sinus liquids/powders

BRAND	SALES*	% CHG
Private label	$199.9	18.9%
Vicks NyQuil	108.9	20.3
Theraflu	35.4	17.9
Mucinex	32.7	302.2
Triaminic	28.6	10.7
Vicks DayQuil	26.1	19.2
Robitussin	21.8	-1.6
Claritin	15.5	-3.2
Dimetapp	15.1	0.8
PediaCare	13.8	103.1
TOTAL	$632.3	7.8%

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

Top 10 lip balms/cold sore medications

BRAND	SALES*	% CHG
Abreva	$89.1	4.8%
Burt's Bees	41.5	33.5
Chapstick Classic	39.4	-5.4
Blistex	25.0	-6.7
Carmex	23.4	0.2
Private label	22.1	-11.9
Chapstick Lip Moisturizer	14.3	-0.5
Mentholatum Soft Lips	12.0	-3.0
EOS The Evolution of Smooth	9.1	99.1
Nivea A Kiss of Moisture	8.5	-8.2
TOTAL	$443.8	3.9%

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

Q&A

Handy work

Tim Cleary, Purell

GoJo is gearing up for the 2012-2013 cough-cold season with a new lineup of Purell hand sanitizers, a factor that breathes new life into a commoditized category. Drug Store News *caught up with Tim Cleary, sales VP for Purell Consumer, for the scoop on the relaunch.*

DSN: Since H1N1, hand sanitizing has been a very private label-dominated, commoditized category. What is the opportunity for retailers in the current environment?

Tim Cleary: Brands are important. They drive categories and, if developed, will provide more reasons for consumer purchasing at a higher dollar ring. ... In addition, retailers will gain incremental business with products for new usage occasions, such as with our portable on-the-go products.

DSN: What are the points of difference with your upgraded Purell Advanced line?

Cleary: [With the] more effective Purell Advanced formula, one squirt kills as many germs as two squirts of any other national brand. That's better germ control and better value for the sanitizer purchase. ... And because it includes skin conditioners and also is clinically proven to maintain skin moisture, we believe nonusers will try it, too. Nurses who sanitize up to 30 times per day have told us that they love this new product.

Top 10 hand sanitizers

BRAND	SALES*	% CHG
Private label	$50.5	-5.4%
Purell	15.0	-13.9
Germ-X	4.5	-40.2
Gold Bond Ultimate	4.1	-41.6
Dial	3.1	-11.4
Clean & Natural	2.1	-49.8
Gold Bond Ultimate Sheer Moisture	1.3	133.2
Veripur	0.9	NA
Germ-X Germ Blaster	0.9	2.1
Dr. Fresh Infectiguard	0.7	60.2
TOTAL	$88.9	-14.5%

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

BUY-IN • COUGH, COLD & ALLERGY

Cough-cold, flu season just starting to move

By Michael Johnsen

As of early February, incidence of cough-cold and influenza still was relatively low, but the season has yet to peak and that means there could be demand for symptomatic relief through March.

"Fever is just starting to move," noted Scott Hanslip, director of sales for IMS Consumer Health, in the first week of February. However, overall incidence of upper respiratory illness was down 7.5% from September through Jan. 21, according to IMS Health tracking.

Annual category sales suggested a different story. According to SymphonyIRI Group data, sales of cough-cold tablets were up 4.2% to $2.7 billion for the 52 weeks ended Dec. 25 across food, drug and mass (excluding Walmart).

However, those sales figures still may reflect some reverberation from the 2009-2010 H1N1 season, Hanslip cautioned. "If you go back to Q4 2009, what's happening is the amplitude of sales has really not caught up yet with what's actually going on," he said. "The inflationary buying that occurred for the pandemic forced an awful lot of adult-type consumption that was false." Consequently, sales of cough-cold products in first quarter 2010 were so low that the first quarter of 2011, included in the present annualized sales figures, was significantly higher.

Top 10 personal thermometers

BRAND	SALES*	% CHG
Private label	$51.0	5.3%
Braun ThermoScan	15.3	8.9
Comfort Scanner	9.3	-1.3
Vicks	8.8	-8.6
Vicks Comfort Flex	6.1	-11.9
Vicks Speed Read	4.3	10.7
BD	3.2	-8.4
Geratherm	2.9	-18.9
Safety 1st Hospital's Choice Fever Light	1.6	47.5
ProCheck	1.4	-4.2
TOTAL	**$116.4**	**1.5%**

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

Breathing OTC life into asthma

Asthma has been becoming more relevant in the nonprescription aisles of late. Even as Armstrong Pharmaceuticals phases out what was an almost $100 million-and-growing brand in Primatene Mist — the Food and Drug Administration has removed any inhalers containing chlorofluorocarbons from the market — homeopathic supplier King Bio is currently presenting an alternative in its AsthmaCare product.

And IMSHealth in the fall launched the site Azma.com — an asthma-related site where content has been organized into three distinct categories by demographics and features a four-day forecast on air quality and potential asthma triggers by zip code. IMSHealth, which also manages pollen.com, is in the beginning stages of marketing its asthma site.

Asthma is already relevant for patients — 7 million children and 18.7 million adults have asthma. And asthma is the primary diagnosis for as many as 17 million annual visits to a healthcare professional on average, according to the Centers for Disease Control and Prevention.

There is even a seasonality associated with asthma that mirrors allergy season. "There is a very strong co-morbidity between allergy and asthma," Scott Hanslip, director of sales at IMS Consumer Health told *DSN*. "In particular, you're talking about a 30% base that suffers from both fronts, particularly for kids."

Top nine nasal aspirators

BRAND	SALES*	% CHG
Graco Nasal Clear	$2.3	12.1%
First Years	1.3	-4.1
Safety 1st Hospital's Choice	0.7	-13.1
Private label	0.7	0.6
Safety 1st Clean Collection	0.6	-14.1
Acu-Life	0.1	-4.7
Nosefrida	0.1	-37.7
Faultless	0.1	17.2
Sunmark	0.1	-9.7
TOTAL	**$6.1**	**-1.8%**

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

Top 10 nasal spray/drops/inhalers

BRAND	SALES*	% CHG
Private label	$105.7	-1.1%
Primatene Mist	65.7	1.5
Afrin	38.2	0.3
Afrin No Drip	33.8	10.0
NeilMed Sinus Rinse	30.1	-0.1
Zicam	20.4	-1.6
Vicks Sinex VapoSpray	15.0	-3.2
NeilMed NasaFlo	15.0	-14.1
Blairex Simply Saline	14.8	-27.2
4 Way	12.4	0.6
TOTAL	**$466.9**	**-0.7%**

* In millions

Source: SymphonyIRI Group for the 52 weeks ended Dec. 25 across FDMx

SELL-THROUGH • HOMEOPATHY

Old-school medicine making a comeback

By Alaric DeArment

Some people swear by it. Others doubt it. What's undeniable, however, is that homeopathic medicine sales were up 15.7% in 2011 to $173 million in natural supermarkets (excluding Whole Foods) and food, drug and mass (excluding Walmart), according to SPINSscan Natural. And with media reports of recalls, dangerous and lethal side effects, counterfeiting and contamination, the homeopathic school of medicine founded by Samuel Hahnemann in 1800 is making a comeback.

According to a January 2011 study commissioned by homeopathic remedy maker Boiron and conducted by the Hartman Group, 15% of shoppers used homeopathic medicine for themselves, while 14% used it for their children and 59% expressed some familiarity with homeopathy. Meanwhile, 46% have successfully used alternative or natural OTC medicine, and 37% are interested in trying. And according to the National Center for Homeopathy, sales of homeopathic remedies rose from $170 million in 1995 to $870 million in 2009.

Those are some of the figures that *DSN* editor-in-chief Rob Eder took to Washington when he joined American Association of Homeopathic Pharmacists president and Boiron VP operations and regulatory affairs Mark Land, AAHP legal counsel Al Lorman, and Samueli Institute president and CEO Wayne Jonas for an AAHP-hosted congressional briefing in September 2011 for House of Representative staffers.

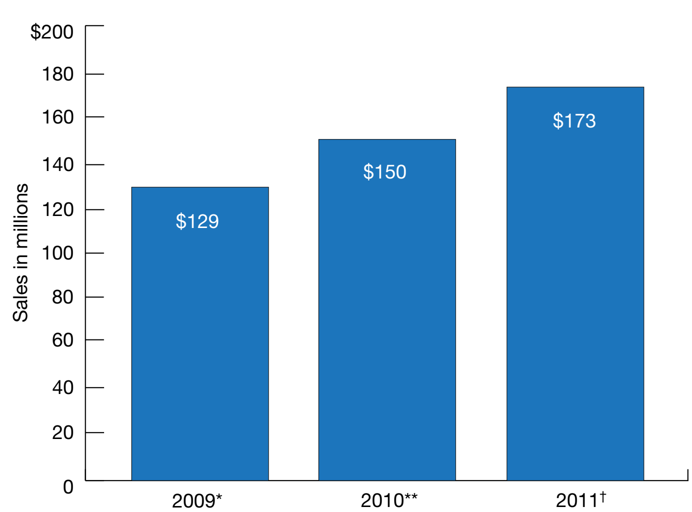
After a heyday in the 1800s, homeopathy gradually began to die out in the early 1900s following the 1910 publication of the "Flexner Report" by the Carnegie Foundation and the American Medical Association, which cast doubt on homeopathy, chiropractics and even pharmacy. By the 1940s, medical schools specializing in homeopathy had all shut down. It then started making a comeback in the 1970s with the rise of the health food movement and took off in the 1990s with the rise in popularity of natural health products.

Quarterly sales of homeopathic meds

BRAND	SALES*	% CHG
Children's	$8.5	27.6%
Cold/flu	7.9	5.1
Pain relief	7.0	24.6
Women's	1.5	-7.0
Stress and sleep	1.4	8.0
Allergy/respiratory	1.0	16.6
Homeopathic singles	0.7	1.4
TOTAL	$33.2	14.2%

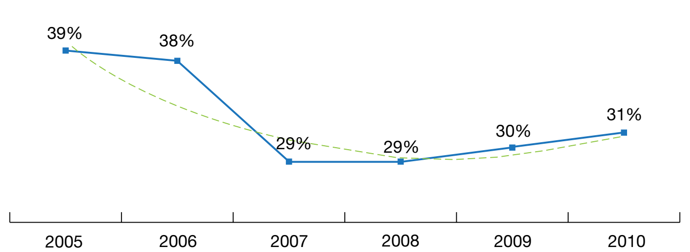
* In millions
Source: SPINScan Conventional, powered by Nielsen for the 12 weeks ended Dec. 24 across FDMx

U.S. sales of homeopathic products



Source: SPINSscan Natural. Total Natural supermarkets (excluding Whole Foods) and conventional FDMx for the *52 weeks ended Aug. 8, 2009; **52 weeks ended Aug. 7, 2010; and †52 weeks ended Aug. 6, 2011

Percent of consumers indicating they have used homeopathic medicines in the past year



Source: National Marketing Institute 2010 Health & Wellness Trend Database

Annual homeopathic sales by remedy

CATEGORY	2011 SALES*	% CHG VS. 2010	2010 SALES*	% CHG VS. 2009
Pain relief	$40,669.0	24.4%	$32,695.0	15.3%
Other medicines	33,753.0	8.4	31,149.2	3.1
Cold/flu	31,557.7	8.1	29,205.8	24.6
Children's	28,650.0	32.5	21,615.7	45.7
Homeopathic singles	13,612.5	11.3	12,226.0	12.5
Stress and sleep aids	8,618.3	8.5	7,946.5	-1.6
Allergy/respiratory	8,056.4	7.5	7,497.7	1.3
Women's	7,479.4	12.9	6,623.4	44.1
Digestive aids	804.0	4.0	772.9	-0.5
TOTAL	$173,200.3	15.7%	$149,732.2	16.5%

* In thousands

Source: SPINSscan Natural. Total Natural supermarkets (excluding Whole Foods) and conventional FDMx for the 52 weeks ended Aug. 8, 2009; 52 weeks ended Aug. 7, 2010; and 52 weeks ended Aug. 6, 2011.